

26 January 1976

MEMORANDUM FOR: Chief, Retirement Affairs Division
SUBJECT : Retroactive Changes in Health
Benefits Enrollments

STATINTL
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1. I requested [REDACTED] to explore with an appropriate representative of the Civil Service Commission the factors involved in subject. [REDACTED] memorandum of 26 January 1976, attached, reflects the results of his efforts.

2. I am convinced that such retroactive changes in health benefits enrollments for annuitants are proper, and you are hereby authorized to apply this decision to those cases now pending in RAD.

STATINTL

[REDACTED]
Deputy Director of Personnel
for Special Programs

Att

STATINTL

CONCUR: [REDACTED]
Acting Director of Personnel

26 JAN 1976
Date

Distribution:

Orig - C/RAD
1 - D/Pers
~~2~~ - DD/Pers/SP (1 w/held)

STATINTL

DD/Pers/SP/ [REDACTED] Jr:gec (26 Jan 76)

26 January 1976

MEMORANDUM FOR: Deputy Director of Personnel
for Special Programs

SUBJECT : Retroactive Changes In Health
Benefits Enrollments

1. After our discussion of that part of Subchapter S7 of the Federal Personnel Manual pertaining to retroactive changes of health benefits enrollments from self-and-family to self-only, I called Mr. Edward Borchers of BRIOH/CSC. I asked if that provisions in the FPM pertained to annuitants as well as employees. He assured me that it did. I pursued the matter further, indicating that we had received information that retroactive effective dates, with corresponding adjustments in health benefits ~~withholding adjustments in health benefits~~ withholdings and contributions, were not granted to annuitants but were, however, permitted for survivor annuitants. Mr. Borchers response was that this made no sense. He pointed out that the FPM refers to "employees" because the FPM is written for the use of federal agencies in applying various programs to employees. But he further stated that the Claims Manual used in BRIOH for administration of retirement matters included the same information regarding retroactive effective dates found in FPM S7. In conclusion, he said that if an annuitant requested a retroactive change in health benefits enrollment from self-and-family to self-only and the annuitant satisfied BRIOH as to the date the last family member lost eligibility for coverage under the family enrollment, the change would be made retroactive with corresponding adjustment in health benefits withholdings and contributions. No distinction is made in application to annuitant vs survivor annuitant.

STATINTL

2. I doubt that there would be any hesitancy on Borchers part to put this in writing. Before doing so, however, I feel sure he would expect us to give him a written request.

Deputy Chief
Benefits and Services Division